

Handling Household Contacts

COVID-19 Community Team Outreach

The CCTO Tool now supports a feature to help you add and maintain contacts who share a household:

NOTE: Always enter all the members of a household as separate contacts, including as much information as possible about each individual. Each contact will receive individual assessments.

Creating a New Household

The "household" feature will allow you to create a grouped record for contacts who share an address and will help reduce data entry. If you know you will be entering new contacts who are members of the same household, **create the household first.**

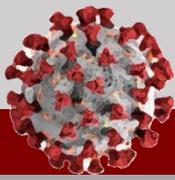
1. Select "New" from the Contacts Tab.
2. **BEFORE ENTERING ANY INFORMATION**, in the toggle for "Household?", select "Yes," and the information fields will change. You can **now** begin populating information about your household.
3. In the "Last Name" field, type an identifying name for your household followed by "Family" or "Household."
4. Fill out the boxes for "Contact Information" and "Address" with the information appropriate to the whole household. **This information will carry over to new contacts you create within this household to help reduce data entry**; however, you are always able to edit and adjust information as needed for individual contacts.
5. Click "Save" when you are finished.
6. You have now created a household profile. This profile itself will not appear in active contacts views; however, any contacts you create within this household will appear normally within your contacts views. See below for information about viewing your household groupings.

- 1 **"New"**
- 2 **"Household?"**
- 3 **"Last Name"**
- 4 **Contact and Address Info**
- 5 **"Save"**
- 6 **Completed Profile**

The screenshot shows the 'New Contact' form in the CCTO interface. The form is titled 'ARIAS Contact' and has tabs for 'ARIAS Contact', 'Household Members', and 'System Information'. The 'Basic Info' section includes a 'Household?' toggle set to 'Yes', a 'C#' field, and a 'Last Name' field. The 'Contact Information' section includes fields for 'Country Code', 'Mobile Phone', 'Phone #2', 'Phone #3', and 'Email'. The 'Address' section includes fields for 'Address Line 1', 'Address Line 2', 'City', 'State/Province', 'Postal Code', and 'County'. The form is annotated with numbered callouts: 1 (New button), 2 (Household? toggle), 3 (Last Name field), 4 (Contact Information section), and 5 (Save button).

Note: The "Household?" toggle is ONLY used to activate the information fields required to enter a new household profile. It should never be used when creating a contact or adding a contact to a household. See below for best practices for adding household members.

The screenshot shows the 'Banks Family' household profile in the CCTO interface. The profile is titled 'Banks Family' and has tabs for 'ARIAS Contact', 'Household Members', 'System Information', and 'Related'. The 'Basic Info' section includes a 'Household?' toggle set to 'Yes', a 'C#' field with the value 'C-0000033030', and a 'Last Name' field with the value 'Banks Family'. The 'Contact Information' section includes fields for 'Country Code', 'Mobile Phone', 'Phone #2', 'Phone #3', and 'Email'. The 'Address' section includes fields for 'Address Line 1', 'Address Line 2', 'City', 'State/Province', 'Postal Code', and 'County'. The profile is annotated with a numbered callout: 6 (Completed Profile).



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Viewing Your Households

A household is a special grouping and not a contact profile, so it will not appear as a list item in your active contacts views.

1. Return to the Contacts Tab.
2. Click the bold text title of your current view and select "My Active Households" from the dropdown menu.
3. Notice that the information you typed in the "Last Name" field will appear as the name of your household. View your household's profile by clicking this name.

- 1 **Contacts Tab**
- 2 **"My Active Households"**
- 3 **Select a household**

Adding New Contacts to Your Household

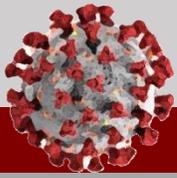
This process is for new contacts who have not yet been entered in CCTO. See below for adding existing contacts.

1. Always begin this process on the household's profile to reduce data entry. Select the "Household Members" tab to see what members currently exist in your household.
2. Select "New Contact" on the RIGHT of the screen to add a new contact to this household who does not currently exist in the CCTO Tool.
3. Because we started from the "Household Members" screen, a quick create screen will appear with pre-populated information from the household profile.
4. Input the remaining information about your new contact or adjust any of the pre-populated information as needed.
5. Click "Save and Close" when finished.

- 1 **"Household Members"**
- 2 **"New Contact"**
- 3 **Quick Create**
- 4 **Input remaining info**
- 5 **"Save and Close"**

The screenshots illustrate the steps to view households. The first screenshot shows the 'My Active Contacts' view with a dropdown menu open, highlighting 'My Active Households' (2). The second screenshot shows the 'My Active Households' list with 'Banks Family' selected (3). The third screenshot shows the 'Banks Family' household profile with the 'Household Members' tab active.

The screenshots illustrate the steps to add a new contact to a household. The first screenshot shows the 'Banks Family' household profile with the 'Household Members' tab active (1). The second screenshot shows the 'Quick Create: Contact' screen with pre-populated information (3). The third screenshot shows the 'Quick Create: Contact' screen with the remaining information input (4). The bottom-right screenshot shows the 'Save and Close' button (5).



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Adding Existing Contacts to Your Household

You can also add contacts who already exist within the CCTO Tool to households. **Note that existing contacts do not take on household address or contact information when they become members of a household, so it is always best to create households first whenever possible.**

1. From your household profile, click "Add Existing Contact" at the right of the screen.
2. Type the name of the contact whom you would like to add to this household in the search bar.
3. Select the record by clicking on it, and your contact's name will move to the top of the screen. You can repeat this process as many times as necessary.
4. Click "Add" when you've finished adding contacts. Your contact will now appear as a member of your household grouping. As a reminder, none of their address or contact information will change when they are added to the household.

1 "Add Existing Contact"

2 Enter contact name

3 Select contact record

4 "Add"

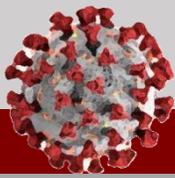
5 Updated Household

NOTE: Deactivating a household will not deactivate any of the contacts within it. Contacts must be deactivated by profile. Similarly, deactivating the contacts will not deactivate the household, and it must be deactivated independently. Always remember that each contact requires an individual profile with unique assessments and personal information.

The screenshot shows the 'Banks Family' household profile in the CCTO tool. The 'Household Members' tab is active. A 'Lookup Records' dialog box is open, allowing the user to search for existing contacts. The search bar contains 'Will Smith', and the results show a contact record for 'Will Smith' with the email 'willsmith@freshprince.com'. The 'Add' button is highlighted, indicating the final step in adding the contact to the household.

The screenshot shows the 'Banks Family' household profile in the CCTO tool. The 'Household Members' tab is active, and the list of household members is updated to include 'Phil Banks' and 'Will Smith'. The table below shows the details of the household members.

✓ C#	First Name	Last Name	Household	Employer	Job Title
C-0000033...	Phil	Banks	Banks Family	---	---
C-0000033...	Will	Smith	Banks Family	---	---



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Indicate Household Relationships

Once you have added members to a household, you can also indicate their relationships to each other (e.g., parent/child) within their profiles.

1. From the "Household Members" tab on your household profile, click a contact's name.
2. Under "Basic Info," review the options under the "Household Relationship" field. You can select "Parent," "Child," or "Additional Household Adult (not associated with child)."
3. **As a note, if you select "Child," you should also scroll to the bottom of the contact's profile to select the button for "Is Minor" and indicate that this child is under the age of 18.**
4. Click "Save & Close" when finished with your work, and repeat this process as needed.

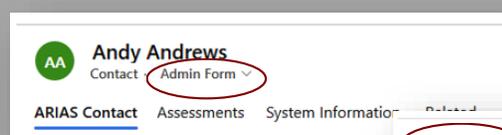
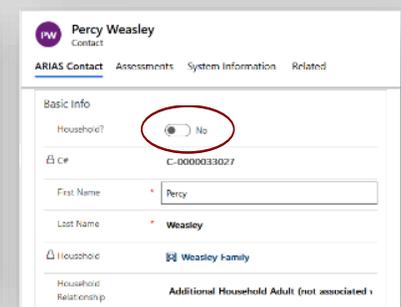
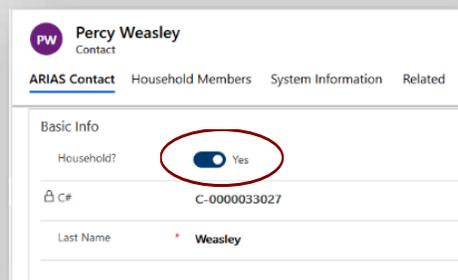
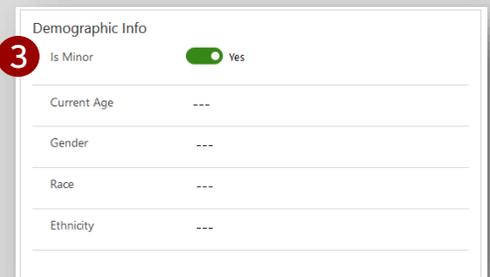
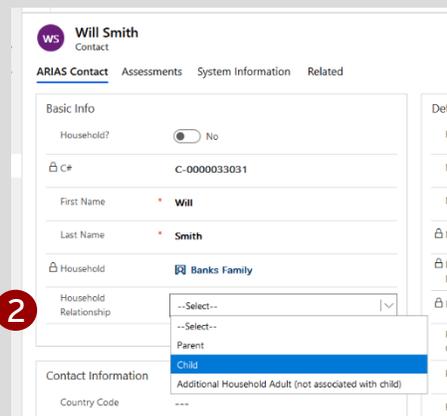
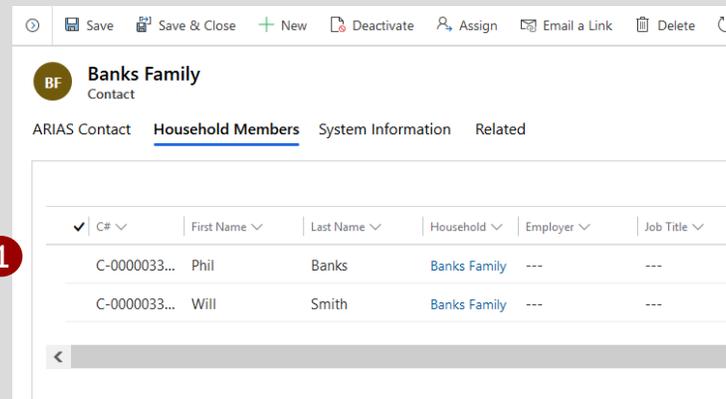
- 1 **Select a contact**
- 2 **"Household Relationship"**
- 3 **"Is Minor"**
- 4 **"Save & Close"**

Troubleshooting for Households

If you accidentally toggle "Household?" to "Yes" while entering a contact's information or editing a contact's profile, **DO NOT SAVE OR EXIT THE PAGE**. Toggle the slider back to "No," and missing information such as testing and monitoring details will be restored. You can now save your contact.

If contacts are added to a household in error, contact your administrator to have the household grouping removed.

FOR ADMINS ONLY: Administrators can unlink households by toggling "MDA Form" to "Admin Form" under a contact's name. This unlocks the "Household" field, and the household name can be deleted.



Unlinking Households (for admins only)